



# Interoffice Memo

**DATE:**

**PHONE:**

**FROM:** **AUTHOR'S NAME**, Author's Title  
Author's Department

**NOTE:** This memo would normally be issued following Verbal Counseling.

**TO:** **RECIPIENT NAME(S)**, Recipient Title(s)  
Recipient Department(s)

SUBJECT	RECORD OF DISCUSSION
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The purpose of this memo is to memorialize our discussion on [DATE] regarding [INSERT TOPIC] and is intended to summarize the deficiencies/issues/concerns discussed and clarify expectations moving forward.

- Be clear and concise. Example: "On January 15, 2018, I met with you to discuss a client complaint. Also present in the meeting was Jane Smith, Administrative Supervisor."
- Indicate the employee's response: State the facts. Be as objective as possible, giving specific details and using quotes when practical.
- Explain the impact of behavior on organization. Example: "Your carelessness resulted in..." OR "Your neglect of duties compromises patient care."
- Cite the violation of rule and/or policy. Example: "Your actions are in violation of HS Standards of Conduct."
- Indicate if the employee was previously counseled for similar misconduct: Example: "You were verbally counseled for discourteous treatment on January 2, 2018."
- List expectations: Example: "You are expected to maintain professionalism in the workplace."

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I acknowledge receipt of this Record of Discussion and understand that a copy will be placed in my personnel file.

\_\_\_\_\_  
Employee

\_\_\_\_\_  
Date

cc: Department Contacts (e.g. Mary Doe, Administrative Manager)  
Human Resources Officer (if appropriate)  
Department File (if appropriate)  
Official Personnel File (if appropriate)